What a Real Estate Professional Needs to Know About Retirement Plans, Trusts, and IRAs

Meet up with Manny Kagan (Mortgage Broker / President of Pacific Bay Financial) and his friends for a night of sharing common interests and ideas. You will have the opportunity to meet people with common real estate interests who own or want to buy commercial or apartment buildings, share, or address any ideas and concerns. Topics for this meeting include:

- New Dept. of Labor and FINRA enforcement initiatives on self-directed IRAs

- Unrelated Taxable Income

- Real Estate as an Investment in Retirement Plans and IRAs

- Prohibited Transactions

MeetUP Details:

Where:

Date: Thursday, June 12th, 2014

Location: 233 Arroyo Drive, South San Francisco, CA 94080 **(Please Meet in the Betty Weber Room)**

Time: 6:30-8:30pm

RSVP: Ausra@Pacbay.net

Web: http://www.meetup.com/Bay-Area-Commercial-Real-Estate-Financing/

Affiliates:

PACIFIC BAY FINANCIAL CORPORATION

PRIMARK BENEFITS
RETIREMENT • PLAN • EXPERTS

Meetup

EQUAL HOUSING OPPORTUNITY

Featured Guest Speakers:

STEPHEN L. DOBROW, ERPA, APA, CPC
President, Primark Benefits
A San Francisco native, Stephen entered the Retirement field in 1976, gained executive experience in Silicon Valley, and returned to Primark Benefits in 1990 to lead its management team. His expertise is in converting tax dollars into employee benefits, which are otherwise unaffordable.

PETER C. KARP, REGISTERED FINANCIAL ADVISOR
President, Karp Capital Management

Peter Karp is the founder of Karp Capital Management Corp, a registered investment advisory firm. The company is headquartered in San Francisco and provides a full range of financial services focusing on asset management strategies, plan participant education/ advisement and business consulting. He is a member of the Financial Planning association, Western Pension & Benefits Association and is a founding partner of NAPA (National Association of Plan Advisors). Karp ranked 25th on the list of top Bay Area Independent wealth advisors with over 7,000 nominations received every year. Learn more and sign up for the Karp Capital Focus quarterly newsletter with asset management insights at karpcapital.com.